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COMPETITIVE INSIGHTS*

May 2001 Issue No. 6

THE CANADIAN INTERNATIONAL FOOD AND BEVERAGE SHOW AND THE CANADIAN FINE FOOD SHOW 2001

Two culinary events taking place in the first months of the year in Toronto provide excellent opportunities to catch up with the latest trends in the Canadian food industry: **the Canadian International Food and Beverage Show and the Canadian Fine Food Show.**

The Canadian International Food and Beverage Show runs three days in February and is the only show in North America dedicated exclusively to food and beverages for the hospitality industry. Owned and managed by the Canadian Restaurant and Foodservice Association (CRFA), this annual show attracts about 10,000 visitors and 800 exhibitors, among them several international participants located in country pavilions.

The demand for speed and convenience became apparent at the 2001 edition of the Food and Beverage Show. Many ready-to-eat options were displayed, along with products representing a wide variety of palates and occasions: vegetarian dishes and seafood next to buffalo meat and ham, low-calorie health style food and nutritional beverages, side by side with deep fried appetizers, pastries and pies, to name a few.

The trend towards "life style foods" has also been confirmed in a recent report from the National Bank Financial**. According to this report, Canadian food service sales have been growing much faster than supermarket sales in the last six years. While food service sales have grown at an annual CAGR*** of 4.3%, supermarket sales have grown at an annual rate of 2.5%. The shift in the "home-meal-replacement" market is mentioned as an important factor for the imbalance. The reason is that hungry and time-starved Canadians have become more and more favourable to visiting quick drive-through pickup windows of restaurant chains, rather than opting for a "convenience meal" at grocery stores or grabbing something from the fridge.

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* A series of period reports that provide observations and insights on market conditions, market structure or other related marketing or investment aspects that may influence the marketing or investment strategies and decisions taken by Canadian companies in their pursuit of export opportunities and business growth. (aussi disponible en français)

** Investors' Guide to the Canadian Grocery Industry, National Bank Financial, April 9, 2001.

*** CAGR = Compound Annual Growth Rate

The Ontario Regional Office of the Agri-Food Trade Service (ATS) of Agriculture and Agri-Food Canada (AAFC), in cooperation with the Trade Evaluation & Analysis Division, the Canadian Restaurant & Food Service Association, the Canadian Food Exporters Association and the US Division of the Department of Foreign Affairs and International Trade organized the following activities at the Show:

- **The ATS booth,** showcasing the Grand Prix New Products Awards, along with the winning products of the Canadian Fine Food Awards. Staff was on hand to provide visitors with market development information and an on-line link to the ATS and related websites.
- **A business centre**, which was used by various companies for one-on-one meetings with buyers at the show.
- **Two breakfast seminars,** featuring Houston-based SYSCO Corporation executives and speakers from the US Customs Service and the Food & Drug Administration, were provided to Canadian companies.

With regards to the **Canadian Fine Food Show**, this annual event is organized by the Canadian Association of Specialty Foods (CASF) and is the only national trade show targeted exclusively to the Specialty Food Industry. The sector represents "premium-quality foods of some uniqueness with good presentation and select distribution". The show attracted 123 exhibitors this year. It took place at the International Centre in Toronto on March 23 – 25, in conjunction with the Toronto Wine and Cheese Show. Agriculture and Agri-Food Canada was represented by staff and a display booth, featuring Canadian fruit wines and information on e-commerce. The booth was organized with the participation of the Business Development Bank of Canada.

"Organic" was very much the focus of attention of the Canadian Fine Food Show this year: organic chocolate, organic bread and organic cereal bars, to name a few. The organic presence reflects the fast growth of this sector in Canada. At present, it is estimated that organic food occupies around 2 % of the Canadian retail market; a percentage that will increase to 10% in 2010, according to industry estimates (All About Canada's Organic Industry, AAFC Factsheet (http://www.agr.ca/cb/factsheets/2industry_e.html).

SHOW THEMES

Below is a selection of products that were displayed at the Canadian International Food and Beverage Show and the Canadian Fine Food Show in 2001.

Life Style Foods

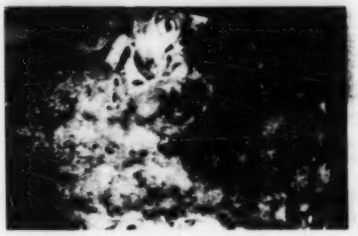
Want a warm meal but don't have so much time? Then **Summer Fresh Salads Inc.**'s **vegetable soups** available in one-serving, microwaveable, plastic containers might be just what you're

looking for! This product is new for the year and offered in Roasted Carrot, Butternut Squash & Pear, Three Mushroom, and seven other varieties. The retail pack sizes are 6 x 454 ml and 6 x 1.36 l, whereas the food service pack size is 6 kilos. The products are sold fresh with a 21 day shelf life and can be frozen for up to six months. Summer Fresh Salads' assortment also includes fresh gourmet salads and over 40 gourmet dips and appetizers, suitable for vegetarian diets and private label for the food service industry and gourmet shops. No flavourings, additives, added preservatives or MSG are used in Summer Fresh Salad's products.

http://www.summerfresh.com

For cold ready-to-eat options, **Ocean' s (Ocean Fisheries Ltd.)** presents a range of **complete tuna meals**. The variety includes three flavours: Sundried Tomato & Herb, Spanish Salad and Zesty Italian presented in 170 gram tins and containing tuna, vegetables and dressing. This meal doesn't require any preparation whatsoever, which makes it ideal for school or office. Another ready-to-eat choice is the **Tuna SnacKit**, consisting of 85 gram tuna and mayonnaise with six crackers. To say that you don't have time to eat is no longer a good excuse! http://www.oceanfish.com

Seafood Casserole by **Sealane Gourmet Foods Ltd**. was the winner of the Ready to Eat/Heat & Eat Category of the Canadian Fine Food show this year. The dish contains 100 % natural shrimp, scallops, lobster, crab, seafood juice, mozzarella cheese and vegetables, and can be used as it is or as a base on pizzas, pastas or in stuffing. It is blast frozen and sold to the food service industry in portion packs of 3 ounces.



For a quick, light snack or with soup or salad, **M.J.'s Fine Foods Artisan Flatbreads** have a variety of uses and are an interesting addition to the breadbasket. The breads are presented in clear, airtight packages with six flatbreads in each package, and boxed 24 per case. The shelf life is 4 weeks and seasoning varies by flavour. **M.J.'s Brand Chive & Garlic Flatbread** was one of the finalists in the Pasta, Rice, Grain, Cereal & Bread category of the Canadian Fine Food Products Awards.

Innovative Product and Packaging Ideas

"As good as fresh gets", is **Martha's Gardens** slogan to market its fresh-cut tomatoes with a shelf life of up to 14 days. The extended shelf life is made possible thanks to a patented packaging process, which the company's research and development team has developed, and which enables the quality, colour and taste of the produce to be maintained. Martha's Garden's processed items comprise onions, peppers, a variety of lettuces and herbs, cabbage, carrots, celery, cauliflower, broccoli, zucchini, tomatoes, eggplants,

cucumber, salad mixes, orange and lemon puree, bananas and cranberries. All are fresh and some can be frozen. The product range will soon also include fresh fruit, and a sulphite-free potato.

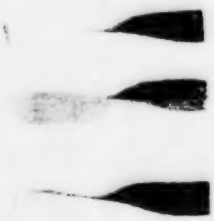
http://www.marthasgarden.com

BURNBRAE FARMS · FERMES Unbreakable eggs became a reality when **Burnbrae Farms** added **Break Free** to its line of innovative egg products. Break Free is a liquid egg product that can be used wherever you use whole beaten eggs: in baking, scrambling and other breakfast dishes. Four tablespoons of Break Free is equivalent in volume to one large egg. The company further developed the idea when it introduced **Omega Pro**, which like Break Free is a liquid product that shares functional properties with Burnbrae Farms' **Omega 3** shells. Omega 3 is a nutritionally enhanced egg with additional omega-3 fatty acids and vitamin E. The secret behind this egg product is the hens' all-natural, flax-based, Vitamin E enhanced diet that was developed by researchers at the University of Guelph. The result was a product that contains 80% less cholesterol and 50% less fat than regular eggs. Omega Pro is presented in two 250 ml containers for the retail market and in a 500 ml package for the food service industry. It received the Grand Prix Award in the New Products Category in 2000.

http://www.burnbraefarms.com/

The sky is the limit and the imagination the trigger when **Queens Pasta** presents its fresh-made pasta in a variety of shapes, sizes and fillings: fish shaped, heart shaped, striped, mushroom-shaped, mini-mini... You name it. The company carries over 100 different items in different flavours, available cholesterol-free and kosher on request. Queens Pasta sells to the retail and wholesale markets in packages of 500 g and for catering. The company also has its own three restaurants. New for the year is a breaded pasta appetizer, which is served deep-fried as a hors d'oeuvre.

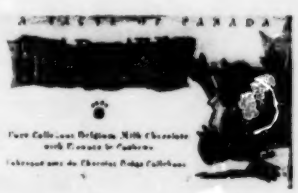
http://www.queenspasta.com



Riuniti®

Janes Family Foods' latest appetizer has good prospects to "rattle your tastebuds". "**Snake Bites**" are bite sized pieces of breaded, tender chicken breast that can be either deep fried or oven baked. The product can be served as a stand-alone appetizer, or customized with appropriate dipping sauces. It is sold frozen to the food service industry in cases of 4 kilos (2 sealed poly bags of 2 kgs), each containing 190 to 210 pieces. The exact condiment in "Snake Bites" is a secret, but will likely evoke images of tropical heat and exotic jungle landscapes. http://www.janesfamilyfoods.com

Continuing on the animal spicy palate, **Bear Paws** are a **Cottage**'s award winning line pure Belgian milk chocolate product is sure to make it into consumers but also of their

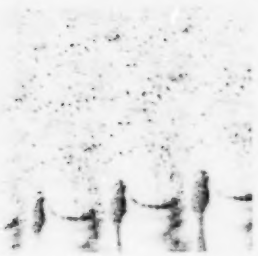


theme, but for a sweet rather than new addition to **Chocolate** of truffles and chocolates. Made of with Peanuts and Cashews, this the pockets not only of younger parents. In addition to Paws, the

Bear line also includes Bear Nuts, Bear Droppings and Bear Patties. All of Chocolate Cottage's truffles and chocolates are made in small batches, ensuring freshness and continuing the art of hand-made products, while distributed across Canada, the United States and Japan.

www.chocolatecottage.com

Ethnic Foods



Enviro Mushroom Farm Inc. offers delicate, fresh enoki mushrooms, also called winter mushrooms, and other exotic specialty mushrooms, grown in the rural horticulture area of Ontario. Used in Japanese cuisine, ~~the taste~~ of enokis has been described as a combination of mild lemon and sweet grapes. The enoki mushroom has a crunchy texture and can be used in salads, hot pot dishes and soups, or added at the last moment to stirfries. Enviro Mushroom Farm Inc.'s range of mushrooms also includes King oyster, Shitake and Lion's mane.

Sourdough cultures from Egypt, Russia and San Francisco are the foundation of **ShaSha Bread's** loaves of organic sprouted bread, wheat-free spelt, sprouted multigrain and **Armenian Lavash flatbread**. The production process used is a combination of ancient techniques and innovative methods resulting from scientific research on bacterial culture. The use of commercial bakers' yeast is shunned by this artisan baker, who believes that a longer fermentation boosts nutritional values and flavour. ShaSha Bread's products are sold both to the retail and the food service industry. The flatbread is presented in 105 g packages and contains unbleached spring wheat flour, durum semolina, filtered water, wheat germ, sesame seeds, poppy and caraway seeds and Kosher salt. It is delicious on its own or with dips, hors d'oeuvres and cheese. http://www.shashabread.com

Sauces, Dressings and Jellies

Le Saucier Inc. is introducing an alcohol-free reduced red and white wine for a variety of uses: as a marinade, to deglaze, in sauce finishing or making, as a seasoning and flavour, for braising, in vinaigrettes salad dressings and on desserts. One tablespoon of **Le Saucier** has the flavour equivalent to a 4 oz. glass of wine. It is produced from fine wine that has been reduced tenfold to remove all of the alcohol and most of the water, capturing all of the wine flavour. Unlike opened wine, Le Saucier enjoys a long shelf life. The product is available in 750 ml, 375 ml and 150 ml bottles of 10:1 and 4:1 concentrates.

www.lesaucier.org

If you ask Renée of **Renée's Gourmet Products** about the secrets of producing good dressings and sauces, her answer will most certainly be that the homemade taste should always be ensured. **Intercorp Excelle Foods Inc.**, the company behind Renée's products, does this by using many fresh produce ingredients and, for some products, fresh dairy ingredients. Since no additives, preservatives or MSG are added, the products must be refrigerated at all times. At the Food and Beverage Show, the company featured its award winning Japanese and Caesar Dressings, among a range of salad dressings, sauces and dips, low fat and sugar free products. Intercorp Excelle Foods Inc. serves the retail, food service, private label and industrial markets with products in a wide variety of packaging.

http://www.renees.com

We've tried hemp beer and hemp tortilla chips... Now we're adding hemp dressing and hemp mustard to the diversified list of hemp uses! **Ruth's Hemp Foods** was awarded top honours for her **Balsamic Hemp Dressing** in the Dressing/Seasoning category of the Canadian Fine Food Products, competing for the desirable prize with another of her products: Ruth's Hemp & Honey Mustard. The Canadian-grown hemp is cold pressed in oxygen-free conditions, which helps it preserve its unique blend of essential fatty acids. It's a must in salads, and can also be used as a marinade for tofu, chicken or vegetables, or heated gently to give a special twist to your favourite pasta.

www.ruthsfoods.ca

Wine and liqueur jellies are an additional way of using the produce of Ontario's flourishing wine district. **Castlefield Fine Wine & Liqueur Jellies** and **The Jelly Crate** are two companies located in the Hamilton region that have taken advantage of their geographic proximity to Niagara wine producers. The companies use VQA Ontario wines and liqueurs to produce a range of red, white and ice wine jellies, which can be applied on crumpets, crepes and crackers, as well as in sauces, and to glazed roasted meat, poultry or game.

Desserts

In a good crop year, Ontario apple growers produce 16 million bushels of apples (768 million pounds or 352 million kilograms). Some of these apples go directly into **Chudleigh's Apple Farm and Bakery's** pies, crumbles and microwave-and-serve baked **Apple Blossoms**. Chudleigh's pies are baked with their own pastry, filled with fresh sliced apples or other fruits, and instant quick frozen berries. The company serves both the food service industry and the retail market in a variety of package sizes, and is also exporting overseas. One of this year's additions to the product range is the Apple Berry Crisp, which is exported to the U.S.

http://www.chudleighs.com

This year, the Dessert Category of the Canadian Fine Food Product Awards went to **Pizza with a Twist** by **Grand River Gourmet**, producer of gourmet snacks, jellies, chocolate and cookies. This gourmet chocolate pizza is available in 600 g and 350 g pizzas, as well as in 75 g slices, in peanut, pecan or smarties. The larger size is supplied in boxes, deceivingly similar to those used for the warm-version pizza. Make sure not to mix them up!

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Company literature and interviews

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